

Annual Energy Outlook 2009 with Projections to 2030

Table 19. Comparison of natural gas projections, 2015, 2025, and 2030 (trillion cubic feet, except where noted)

Projection	2007	AEO2009 reference case	Other projections					
			IHSGI	EVA	DB	IER	SEER	Altos
2015								
Dry gas production ^a	19.30	20.31	21.93	20.35	21.96	15.64	22.13	20.40
Net imports	3.79	2.36	3.01	3.74	5.02	10.75	3.55	5.54
Pipeline	3.06	1.11	1.41	1.98	2.83	5.01	1.80	1.34
LNG	0.73	1.25	1.60	1.76	2.19	5.74	1.75	4.20
Consumption	23.05	22.77	24.92	25.56	26.21	26.39	25.68	22.55 ^b
Residential	4.72	4.87	5.08	5.07	5.22	5.28	4.91	4.22
Commercial	3.01	3.16	3.14	3.08	3.34	2.28	3.27	2.87
Industrial ^c	6.63	6.80	6.97	7.38	7.26	5.35	6.58	6.30 ^d
Electricity generators ^e	6.87	6.04	7.63	8.05	8.38	8.83	9.03	9.15
Other ^f	1.81	1.90	2.11	1.98	2.01	4.65	1.89	NA
Lower 48 wellhead price (2007 dollars per thousand cubic feet) ^g								
	6.39	6.27	8.73	6.16	7.80	7.38	6.85	7.47
End-use prices (2007 dollars per thousand cubic feet)								
Residential	13.05	12.32	14.49	NA	NA	12.58	12.76	NA
Commercial	11.30	10.86	13.06	NA	NA	11.28	11.23	NA
Industrial ^h	7.73	7.21	10.67	NA	NA	9.86	8.15	NA
Electricity generators	7.22	6.90	9.40	NA	NA	8.16	7.74	NA
2025								
Dry gas production ^a	19.30	23.22	22.07	18.75	19.75	14.51	21.32	18.80
Net imports	3.79	1.35	3.51	8.50	5.36	7.76	3.24	9.50
Pipeline	3.06	0.15	0.91	2.91	1.83	2.02	0.56	0.30
LNG	0.73	1.20	2.60	5.58	3.53	5.74	2.68	9.20
Consumption	23.05	24.67	25.56	27.41	24.83	22.27	24.56	26.06 ^b
Residential	4.72	4.99	5.31	5.31	5.76	5.40	4.95	4.10
Commercial	3.01	3.36	3.18	3.14	2.73	2.23	3.50	3.09
Industrial ^c	6.63	6.76	7.36	8.16	5.92	4.28	6.64	6.60 ^d
Electricity generators ^e	6.87	7.38	7.55	8.69	8.59	5.47	7.49	12.27
Other ^f	1.81	2.19	2.17	2.11	1.82	4.88	1.99	NA
Lower 48 wellhead price (2007 dollars per thousand cubic feet) ^g								
	6.39	7.33	7.47	7.20	9.45	8.17	7.25	9.21
End-use prices (2007 dollars per thousand cubic feet)								
Residential	13.05	13.43	13.02	NA	NA	13.37	13.35	NA
Commercial	11.30	12.07	11.63	NA	NA	12.07	11.56	NA
Industrial ^h	7.73	8.22	9.35	NA	NA	10.77	8.55	NA
Electricity generators	7.22	7.95	8.10	NA	NA	8.95	8.06	NA

Table 19. Comparison of natural gas projections, 2015, 2025, and 2030 (continued)
(trillion cubic feet, except where noted)

Projection	2007	AEO2009 reference case	Other projections					
			IHSGI	EVA	DB	IER	SEER	Altos
2030								
Dry gas production ^a	19.30	23.60	22.33	18.49	18.70	13.76	20.44	17.70
Net imports	3.79	0.66	3.56	9.17	5.39	7.64	3.74	11.01
Pipeline	3.06	-0.18	0.51	2.49	1.83	1.97	0.32	0.01
LNG	0.73	0.85	3.05	6.68	3.56	5.68	3.42	11.00
Consumption	23.05	24.36	25.87	29.41	23.81	21.41	24.18	28.13 ^b
Residential	4.72	4.93	5.39	5.43	6.06	5.60	4.92	4.63
Commercial	3.01	3.44	3.23	3.17	2.35	2.50	3.66	3.69
Industrial ^c	6.63	6.85	7.32	8.60	5.09	3.42	6.62	7.61 ^d
Electricity generators ^e	6.87	6.93	7.75	9.94	8.59	4.36	6.98	12.20
Other ^f	1.81	2.21	2.19	2.27	1.73	5.52	1.99	NA
Lower 48 wellhead price (2007 dollars per thousand cubic feet) ^g								
	6.39	8.40	7.61	7.78	9.94	8.88	7.28	10.13
End-use prices (2007 dollars per thousand cubic feet)								
Residential	13.05	14.71	13.06	NA	NA	14.08	13.48	NA
Commercial	11.30	13.32	11.70	NA	NA	12.78	11.56	NA
Industrial ^h	7.73	9.33	9.47	NA	NA	11.48	8.57	NA
Electricity generators	7.22	8.94	8.23	NA	NA	9.66	8.31	NA

NA = not available.

^aDoes not include supplemental fuels. ^bDoes not include natural gas use as fuel for lease and plants, pipelines, or natural gas vehicles.

^cIncludes consumption for industrial CHP plants, a small number of electricity-only plants, and GTL plants for heat and power production; excludes consumption by nonutility generators. ^dIncludes lease and plant fuel. ^eIncludes consumption of energy by electricity-only and CHP plants whose primary business is to sell electricity, or electricity and heat, to the public. Includes electric utilities, small power producers, and exempt wholesale generators. ^fWith the exception of IHSGI and IER, includes lease, plant, and pipeline fuel and fuel consumed in natural gas vehicles. IHSGI includes lease and plant fuel with industrial consumption. IER includes agricultural and non-energy use in other consumption. ^g2007 wellhead natural gas prices for EVA and DB are \$6.68 and \$6.91 per thousand cubic feet, respectively. ^hThe 2007 industrial natural gas prices for IHSGI and SEER are \$8.56 and \$7.59 per thousand cubic feet, respectively.

Sources: **2007 and AEO2009:** AEO2009 National Energy Modeling System, run AEO2009.D120908A. **IHSGI:** IHS Global Insight, Inc., *2008 U.S. Energy Outlook* (September 2008). **EVA:** Energy Ventures Analysis, Inc., *FUELCAS: Long-Term Outlook* (January 2009). **DB:** Deutsche Bank AG estimates (September 2008). **IER:** Institute of Energy Economics and the Rational Use of Energy at the University of Stuttgart, TIAM Global Energy System Model (November 2008). **SEER:** Strategic Energy and Economic Research, Inc., "SEER Balanced Portfolio, \$45 per ton Carbon Tax 2015" (April 2008). **Altos:** Altos World Gas Trade Model (October 2008).